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The Netherlands

Retail Food Sector Report

1999

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Report Highlights:

Dutch eating habits are changing with consumers demanding more convenience, more fresh foods, a greater variety, and more specialty food items.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
The Hague [NL1], NL

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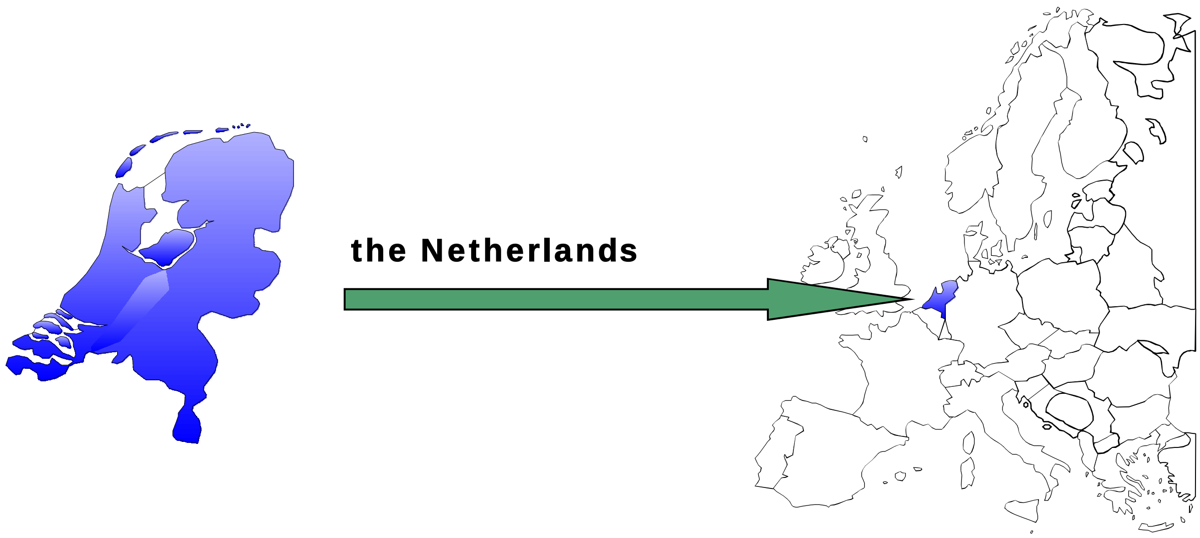
Section I. Market Summary

- In the Netherlands, market share is as follows: supermarkets 68%, specialty stores 22% and local markets, department stores, gas stations etc. make up the balance.

- As a result of changing demographics and increased wealth, Dutch eating habits are changing Consumers are demanding more convenience foods, more fresh foods, a greater variety, and more specialty food items. In addition to low prices, the Dutch consumer values quality, a wide variety, and service.



- The Netherlands is one of the most densely populated countries in the world, with a population of 15.7 million consumers. The Netherlands has 971 inhabitants per square mile as compared to 860 in Japan and 75 in the United States. In size, the Netherlands is about ¾ that of Maryland which has 502 inhabitants per square mile. Five percent of the Dutch population, is non-Dutch with Turkish and Moroccan inhabitants comprising the largest, single, ethnic groups. The number of Americans in the Netherlands is over 13,000.

The Netherlands: Consumer food expenditures (in million Dutch guilders)					
	1993	**1994**	**1995**	**1996**	**1997**
Total	43,559	44,956	46,013	46,664	48,807
Grocery stores	30,989	32,592	33,839	34,858	37,043
Specialty stores	9,458	9,282	9,081	8,851	8,445
Others	3,112	3,091	3,093	2,955	3,320
Value 1US$/Dfl	1.86	1.82	1.61	1.69	1.95

Source: Food Trends

Trends in the Dutch Food Market
• **Health**: natural ingredients - low calory - no sugar - fresh - organic
• **Convenience:** frozen foods - fresh, pre-packed - take-away - easy to prepare
• **Price:** special offers - shop-around
• **Winners**: fish - meals - petfood
• **Distribution**: more power to the supermarket - fewer specialty stores - more shopping at the gas and railway station
• **Stores**: more personal service - wider assortment - more fresh and non-food - convenience foods - more exotic products - environmental friendly products

- It is not easy to sell a U.S. food product in the highly competitive Dutch food market, although some have proven that it can be done (see Annex: 1.).

Advantages	Challenges
Sophisticated market, good buying power	Markets are saturated, competition is fierce
Well organized trading system, many speak English	Transportation costs, import duties
Favorable image of American products	Label & ingredient requirements
Strong interest with buyers in unique and innovative products	Difficult to attract the attention of the large buying groups

Dutch Food Purchasing Attributes

- In the Netherlands 90 percent of all customers are an average of 9 minutes away from a supermarket. Most people walk or bicycle to the food store.
- The average size of a Dutch supermarket is small compared to those in the U.S.
- Dutch supermarkets are now open in the evening, usually till 08:00.
- In 1997, 64% of Dutch households own a microwave (compared to 49% in 1995).
- Consumer interest in organic products is growing although many believe that organic products are expensive. The supermarket has become the most important outlet for these products.
- In the Netherlands, genetically modified organisms (GMO's) in food are generally less of an issue with the consumer then with the food producer, importer/wholesaler and retailer. Consumer organizations usually have a balanced opinion, whereas pressure groups are against the use of GMO's in food. Producers and retailers are sometimes targeted by anti GMO pressure groups and therefore fear consumer scare and consequent loss of market share. If more than one percent of GMO's are used in food, the law and the Dutch retailers want it clearly specified on the label.

Section II. Road Map for Market Entry

Entry Strategy

- Start testing the Dutch market by sending your **product- and price information** to importers. Include labels and provide harmonized tariff numbers. Ask importers for their frank opinion on the marketability of your product and , ask if they want to receive samples. Make it easy for them to reply, use a preprinted fax form which they can fill out and fax-return to you. **Request a list of importers** and available market information from **OAA/The Hague**. Suggestion: send copy of your mailing to importers to AgAffairs Office The Hague, enclose your mailing list. Contact info * see Section V.

- Consider the range of trade shows and demonstrate your product in the most relevant show. either the SIAL in Paris, October 22-26, 2000 (even years) or the ANUGA in Cologne, October 13-18, 2001 (odd years). These food shows are the largest of their kind and visited by Dutch and other European food buyers. See Annex 2.

- Participate in the U.S. Food Export Showcase (USFES) at the Food Marketing Institute (FMI) Convention in Chicago, May 7-9, 2000. The USFES is visited by Dutch and other international buyers. See Annex 2.

- Once you have established contact with an interested Dutch party, visit the person and his company and together make a plan of action. Be patient, show perseverance and involvement. In the Dutch food retail market, listing fees do not exist. However, a Dutch company usually expects your financial involvement in a promotional plan. Contact your State Department of Agriculture and/or your State International Marketing Office and Trade Association seek their assistance and find out if you can participate in the Market Access Program (MAP).

- Dutch supermarket organizations rarely import foreign foods directly, due to the lower volume. They often refer foreign exporters to the Dutch specialty food importers. See Annex 3.

- A U.S. food company interested in selling its food products to the Netherlands maximizes its selling opportunities by using a Dutch importer/wholesaler. This importer already has an entree with a number of supermarket buyers and is able to easily introduce the U.S. product. Besides, the importer is already supplying product to the particular wholesale- or retail operation, which make the logistics a lot easier.

- Logistics are a very important issue. Dutch retail stores are usually in the inner cities and difficult to reach by truck. They are supplied daily and often even twice a day. Retailers want small stocks, which means frequent and fast delivery to the distribution centers by food producers/wholesalers.

- The importer/wholesaler already has a good contact with supermarket buyers and will “test market” your product with these buyers. Their negative or positive reply weighs heavily in the importers’ decision to import your product.

- Be aware that the Netherlands has a highly developed and competitve food market. There is fierce price competition between supermarket operators in order to maintain or enlarge their market share. The Netherlands itself has a large food production industry and nearby EU countries as Germany, Belgium, France and the U.K. are supplying sophisticated foods and beverages to the Dutch market. These foreign suppliers operate with relatively low transportation costs and their products are not subject to import duties.

- A product will be of great interest to the buyer if it is innovative and will produce a profit. Innovation, can be either the product itself, the packaging and/or the pricing.

Most popular products are those which have:

U innovation and therefore added value

U a higher than average trade margin

U a professional and substantial support plan

- A few examples of innovative products at the FMI/USFES in Chicago in May 1999: organic tortilla chips, chocolate covered cookies for dogs, low-fat eggs, hamburger stackers in jars and freshly brewed tea in jars.

Market Structure

- In the Netherlands, about 68 percent of food sales take place in supermarkets, 22 percent in the specialty stores and 10 percent via the market, department stores, gas stations etc. This illustrates the strong position of the supermarket organizations in the Dutch market.

The Netherlands: Number of Retail Food Stores According to Floor Space

	1996	1997	1998	2000	2005
Hypermarkets (>2,500 m2/26,910 sq.feet)	40	40	43	50	60
Large Supermarkets (1,000 m2/10,764 sq.f. - 2,500 m2/26,910 sq.f)	592	624	644	700	840
Small Supermarkets (400 m2/4,305 sq.f - 1,000m2/10,764 sq.f)	2,236	2,267	2,284	2,325	2,350
Superettes (100 m2/1,076 sq.f - 400 m2/ 4,305 sq.f)	1,736	1,665	1,641	1,525	1,250
Small stores (<100 m2/1,076 sq.f)	1,925	1,618	1,540	1,230	900
Total	6,529	6,214	6,154	5,930	5,400

- There are supermarket chains with
  - national coverage: Albert Heijn and the members of the Laurus Group,
  - regional coverage: members of Superunie, and there are
  - independents who buy through Trade Service Nederland
  - others

- The specialty stores are continuously losing market share to the supermarkets because they do not have economies of scale. The market share of speciality stores was 26 percent of the food market 1993 but it decreased to 22 percent in 1998. The longer opening hours (since 1996) also create problems for the usually family operated specialty store. Most specialty stores specialize in either bakery products, or meat, fish or fruits and vegetables or fish.

- Wine, liquor, and drug chain-stores are practically all owned by the large supermarket organizations and growing in importance at the expense of the privately owned stores in this market sector.

- Relative new food retailers in the Dutch market are gas stations, food stores at railway stations/airports and small convenience food stores in the inner cities. To an increasing extent, the large wholesale/retail food organizations are suppliers to, or owners do these outlets.

- Private label brands continue to be popular with Dutch consumers and accounted for 21.1 percent of total sales volume in 1998. Albert Heijn, the largest super market chain in the country, private-label products have a 30% share. Both private label and premium brands have a good quality image with the average Dutch consumer.

Private Label share by Country: Volume	
United Kingdom	44.7
Belgium	34.8
Germany	33.5
France	22.2
The Netherlands	21.1

Source: PLMA

Company Profiles

- Due to a high leverl of market concentration in the Netherlands, most of the retail food buying is done by a few companies. In the future we feel that concentration of buying power will grow on the national level and, to a greater extent, on the international level.

- It can be expected that within 10 years, the majority of European or Dutch food will be bought via centralized buying offices of the large retailers or via the buying offices of cooperating smaller retailers. As an example, Albert Heijn, the largest Dutch retailer, belongs to the Swiss based AMS, Associated Marketing Services AG. This is a purchasing entity which buys for 12 different European supermarket companies, with a total of 14,000 stores, in 12 different countries. In 1996 AMS bought over US$ 96 billion of food products which were sold in the 14,000 stores under the brand-name "Euroshopper". AMS is only one, although a large one, of the 12 European buying agencies for supermarkets.

The Netherlands: the Four Largest Food Buying Organizations, Buying Approx. 85 % of Dutch Food Needs in 1999

Retailer/Wholesaler - type of outlet	Sales($Mil)/ Mrkt share %	Number of Outlets	Purchasing
Albert Heijn, Retailer, National Multiple	$5,565 28 percent	681 nation wide	Direct, Imp./ wholesaler
Laurus Group, Buying organization for Super De Boer, Edah, Konmar and Basismarkt	$4,500 24 percent	1,614 nation wide	Direct, Imp./ wholesaler
Superunie, Buying organization for about 17, usually family owned, regional supermarket chains	N.A. 18 percent	1,718 regional	Direct, Imp./ wholesaler
Trade Service Nederland (TSN) Buying organ. for two wholesalers Schuitema and Sperwer.	$2,700 15 percent	1,930 nation wide	Direct, Imp./ wholesaler
more info on the above and other buying groups, see Annex 4.			

Source: Elsevier Bedrijfsinformatie

Buying Procedures

- Dutch supermarket organizations very seldom import themselves. They are not very much interested in buying directly due to the lower volume, niche type, foreign products. They often refer foreign exporters to the Dutch importers. (see Annex 3.)

- The buying department of **Albert Heijn**, the largest Dutch food retailer, consists of seven separate units, headed by a Unit manager who supervises various Category managers (± 40 in total) . Category managers are responsible for one or more products and they handle buying, sales, logistics and all merchandising activities. Category managers have profit-responsibility for their own products.

- **Laurus** buys for member retailers, Super De Boer, Edah, Konmar and the Basismarkt all having nation wide representation. The Central Buying Department of Laurus negotiates and receives offers from food sellers. The Laurus buyers, about 25 in total, present the offers to the buyers of the various member chains.

- **Superunie** has about 25 buyers who buy on behalf of its 17 members. These are mostly family owned, regional supermarket chains. After the central buying department of Superunie accepts the offer of the supplier, the product is offered to all members of Superunie during regularly held buying meetings. Superunie has about 25 buyers.

- **Trade Service Nederland (TSN)** buys for two wholesale organizations Schuitema and Sperwer. TSN is a fully owned subsidiary of Schuitema and AHOLD (Albert Heijn) owns 73 percent of the Schuitema shares. TSN has about 30 Assortment managers/buyers, each responsible for their own products and its profits.

- Usually the purchasing department of a retail/wholesale grocery operation is split up into several units headed by a Unit Manager and each unit has several Category- or Product Managers. In contrast to the former "food buyer", category - or product managers have full profit responsibility. Therefore, generally, the manager will only purchase products which will bring a profit to the company in order not to endanger his bonus.

- Contact the category manager or importer/wholesaler by writing him a short personal letter, and follow up by a telephone call to make an appointment.

- Before visiting the category manager or importer/wholesaler, make sure you are informed about the company. In case of a retailer, visit a few of their stores in advance.

Evaluating Importers

- Select an importer who has an excellent network of contacts in the retail trade, preferably with nation-wide distribution. A Dutch importer with nation-wide distribution gives a U.S. exporter access to the Dutch supermarket buyer along with valuable expertise. In return, a Dutch importer typically expects loyalty and promotional support. An importer often insists on an exclusive contract for the Netherlands. As a rule of thumb, the importer/wholesaler expects a margin of 23 to 24 percent of the CIF price, including costs. The retailer's margin is generally a minimum of 30 percent. These margins are representative of the specialty foods typically imported from the United States.

For a partial listing of Dutch Specialty food Importers/Wholesalers see Annex: 3.

Profile of the Dutch Businessman/woman

These are some generalities often heard about Dutch businessmen or women:

- Practically all speak English.
- They usually have no time for business lunches or dinners.
- The Dutch don’t beat around the bush and don’t skirt the issues. After very brief introductions, they expect you to come straight to the point. They give you their frank opinion and let you know if you offer them something they don’t want.
- Dutch food buyers, the category managers and/or product managers, are fully responsible for the buying process and profits the product will bring. They are only interested to speak to decision makers.
- The Dutch businessman is looking for a relationship, almost a partnership. Once you start doing business with him he expects continued support from you.
- The Dutch usually know their business and know what your competition is doing. The Dutch businessman understands that you need to make a profit. He is a tough but fair negotiator.

Section III. Competition

- The EU produces, a large variety of foods at competitive prices.

- EU food producers andexporters have the advantage of relative low transportation cost and fast delivery times. Their product is not charged with import duties nor do they face major ingredient or labeling requirements.

- The U.S. has a significant share of the Dutch import market for the following products:

1	Tex. Mex. foods	80 percent
2	grapefruit	50 percent
3	canned salmon	25 percent
4	tree nuts	22 percent
5	wine	4 percent

Section IV. Best Products Prospects

A. Popular U.S. Food Products in the Dutch Market

- Texmex foods
- Snack Foods
- Pink Grapefruit
- Nuts
- Wine
- Pet food
- Canned salmon

B. U.S. Food Products not present in significant quantities, but which have good sales potential, include:

- A variety of grocery items, from peanut butter to Pringle chips, from sport drinks to cheese balls, etc.
- Red apples
- Fresh orange juice
- Fresh beef
- American cheese

C. U.S. Food Products not present because they face Significant Barriers

- Canned fruits (high tariffs)
- Frozen whole turkeys and parts (high tariffs)
- Poultry meat (phytosanitary)

Section V. Post Contact and Further Information

- Office of Agricultural Affairs (O.A.A.) American Embassy
  Postal Address: U.S. Embassy-AGR, Unit 6707, Box 038, APO AE 09715
  Phone: 31-70-3109299, *Fax:* 31-70-3657681, *e-mail:* agthehague@fas.usda.gov,
  Http://www.usemb.nl
  Visitor Address: Lange Voorhout 102, 2514 EJ The Hague, the Netherlands

- The Netherlands follows EU policies in regard to labeling and ingredient requirements. The Dutch Commodities Act (Warenwet) supplies general guidelines and requirements for foods. The basic objectives of this law are health protection, product safety and labeling. A more detailed report which specifically addresses labeling and ingredient requirements in the Dutch market entitled, **the Netherlands: Food and Agricultural Import Regulations & Standards (FAIRS)** report can be obtained from the FAS homepage: http://www.fas.usda.gov etc.

Annex 1.

U.S. Exports of Consumer-Oriented Products to the Netherlands (US$ 1,000)

	1995	1996	1997	1998
Consumer-Oriented Products	309,497	341,408	344,201	392,243
Snack Foods (ex nuts)	5,851	6,924	6,068	7,595
Breakfast Cereal & Pancake mix	541	572	547	375
Red Meats, Fresh/Chilled/Frozen	18,590	14,581	15,492	16,284
Red Meats, Prepared/Preserved	1,347	717	926	1,775
Poultry Meat	11,829	17,542	9,039	1,616
Dairy Products	7,738	9,941	8,083	11,821
Eggs & Products	3,680	8,902	5,857	5,318
Fresh Fruit	31,716	31,429	26,681	24,649
Fresh Vegetables	2,298	1,843	3,867	2,999
Processed Fruit & Vegetables	55,099	43,170	40,823	59,314
Fruit & Vegetables Juices	45,402	32,267	50,816	47,451
Tree nuts	59,352	96,495	77,111	80,990
Wine & Beer	10,234	10,598	17,097	47,712
Nursery Products & Cut Flowers	19,582	32,154	35,228	29,641
Pet Food (dog & cat)	11,628	13,156	17,610	12,397
Other Consumer-Oriented Products	24,608	21,115	28,956	42,305

Source: BICO

Annex 2.

Food Shows Frequently Visited by Dutch Food Buyers		
Show	**When**	**Show Organizers**
HORECAVA, Amsterdam, the Netherlands (Hotel, Restaurant Show)	January 10-13, 2000	tel: + (31) 20 575 30 32 fax: + (31) 20 575 30 93 http://www.rai.nl
ROKA, Utrecht, the Netherlands	February 20 - 23, 2000	tel: + (31) 30 295 59 11 fax: + (31) 30 294 03 79 http://www.jaarbeursutrecht.nl
FMI, Chicago, United States < **Participation in** U.S. Food Export Showcase tel: + (1) 202 296 9680 fax: + (1) 202 296 9686	May 7 - 10, 2000	tel: + (1) 202 452 8444 fax + (1) 202 429 4559 http://www.fmi.org
World of Private Label (PLMA) Amsterdam, the Netherlands **< U.S. Participation** USDA/FAS, Washington Trade Show Office tel: + (1)202 720 3623 fax + (1)202 690 4374	May 23 - 24, 2000	tel: + (31) 20 575 30 32 fax: + (31) 20 575 30 93 http://www.plma.com
SIAL, Paris, France < **U.S. Participation:** USDA/FAS, Paris, France tel: + (33) 1 431 222 77 fax + (33) 1 431 226 62	October 22 - 26, 2000	tel: + (33) 149 68 54 99 fax: + (33) 147 31 37 75 http://www.frenchfoodfinder.com /sial.htm
ANUGA, Cologne, Germany < **U.S. Participation:** USDA/FAS/ATO Hamburg, Germany tel: + (49) 40 414 6070 fax: + (49) 40 414 60720	October 13 - 18, 2001	tel: + (49) 221 82 10 fax: + (49) 821 34 10 http://www.koelmesse.de/anuga/ english/index.html

Or contact the International Marketing Section of your State Department of Agriculture.

Annex 3.

Partial Listing of Dutch Specialty Food Importers/Wholesalers

AMERICAN FOOD SERVICE
Gageldijk 1
3602 AG Maarssen
tel. 030-2613604
fax. 030-2613624 Contact: Mr. G. Chin A. Kwie

BOAS b.v.
Stephensonstraat 40
2723 RN Zoetermeer
Ph. 079-3442600
fax. 079-3421722 Contact: Mr. Th. van Ham

GranFood b.v.
Saturnusstraat 43 Postbus 19045
2516 AE Den Haag 2500 CA Den Haag
Ph. 070-3815007
fax. 070-3815013 Contact: Mr. Onno Brokke

DE KWEKER
Centrale Groothandelsmarkt S1
1051 KL Amsterdam
tel. 020-6828866
fax. 020-6827366 Contact: Mr. P.F. Poelstra

LUSTO b.v.
Vareseweg 115
3047 AT Rotterdam
Ph. 010-4621233
fax. 010-4621270 Contact: Mr. F.M.J.W. Luijk

PIETERCIL BARENDS b.v.
Bleiswijkseweg 51
2712 PB Zoetermeer
Ph. 079-3441100
fax. 079-3420831 Contact: Mr. J. Hoop
Mrs.. R. Andreoli

SLIGRO b.v.
Corridor 11
5466 RB Veghel
tel. 0413-343500
fax 0413-341520 Contact: Mr. G. van de Ven

SUNCOMEX b.v.
Vanadiumwg 15
3812 PX Amersfoort
Ph. 033-4659075
fax 033-4651449 Contact: Mr. B.E. Boerema

Note: Country Code for the Netherlands is (31)

Annex 4.

The Netherlands : Buying Association / Supermarket				
Organization	Chain/Supermarket	No. of Outlets	Retail surface in sq. m.*	Location
Super Unie 18% approx. mkt. share HQ : Industrieweg 22 b P.O. Box 80 4153 ZH Beesd. Tel : 31-345-686 666 Fax : 31-345-686 600				
Hermans Groep HQ : Baarn Tel: 31- 35-548 3311 Fax: 31-35-541 1751	**A & P Hypermarket**	125	750 m2	Nation wide
	Wine & Liquer Store	5	80 m2	
Maxis C.V. HQ : Utrecht Tel: 31-30-247 2000 Fax: 31-30-247 2101	**Maxis** (A & P Hypermarket)	6	7,000 m2	Arnhem, Ede, Muiden, Venlo, Leeuwarden & Alkmaar
	Wine & Liquer Store	6	120 m2	
Dekamarkt B.V. HQ : Velsen Noord/Beverwijk Tel: 31-251-276 666 Fax: 31-251-276 600	**Dekamarkt**	62	825 m2	North & South Holland and Flevoland
	Wine & Liquer Store	24	72 m2	
	Drug Store Bubbles	4	225 m2	
	Dekamarkt Gas Station	1		
Deen Supermarket B.V. HQ : Hoorn Tel: 31-299-252 100 Fax: 31-299-252 102	**Deen**	25	842 m2	North Holland
Groenwoudt Groep HQ : Renswoude Tel: 31-318-579 254 Fax: 31-318-579 242	**Groenwoudt Supermarkets**	68	1,200 m2	Overijssel, Gelderland, Flevoland, Utrecht, North Brabant, & South-Holland
	Nieuwe Weme Supermarket	39	1,518 m2	Groningen & Friesland
	Lekker & Laag	2	1,800 m2	Tilburg & Boxtel
	Wine & Liquer Store	63	100 m2	Nation wide
	Trekpleister (drugstore)	200	200 m2	Nation wide
	Kruidvat (drugstore)	470	200 m2	Nation wide
EM-TÉ Trommelen Beheer HQ :Kaatsheuvel Tel: 31-416-542 500 Fax: 31-416-542 519	**Em-Té**	11	987 m2	North Brabant
	Wine & Liquer Store	11	67 m2	

Jan Linders HQ : Nieuw Bergen (L) Tel: 31-485-349 911 Fax: 31-485-342 284	**Jan Linders**	43	650 m2	South East-Gelderland, East Brabant & Limburg
Gekoma HQ : Apeldoorn Tel: 31-55-599 8499 Fax: 31-55-599 8490	**Komart Supermarket**	16	850 m2	Apeldoorn and surrounding area
	Wine & Liquer Store	6	60 m2	
Kluft Distrifood HQ : Beverwijk Tel: 31-251-275 700 Fax: 31-251-226 969	**Komart Supermarket**	25	800 m2	Utrecht & North Holland
	Wine & Liquer Store	15	65 m2	
Grosmarkt B.V. HQ : Broek op Langedijk Tel: 31-226-315 744 Fax: 31-226-313 655	**Grosmarkt**	10	1,000 m2	North Holland
	Wine & Liquer Store	5	80 m2	
Hoogvliet B.V. HQ : Alphen a/d Rijn Tel: 31-172-418 218 Fax: 31-172-421 074	**Hoogvliet**	30	1,000 m2	Utrecht, South-Holland & Gelderland
	Wine & Liquer Store	16	75 m2	
Nettorama Distributie B.V. HQ : Oosterhout Tel: 31-162-455 950 Fax: 31-162-456 520	**Nettorama Users Markets**	20	1,120 m2	Overijssel, Utrecht, South-Holland, North-Brabant Drenthe & Limburg
Poiesz Supermarkten B.V. HQ : Sneek Tel: 31-515-428 800 Fax: 31-515-428 801	**Poiesz Supermarket**	30	760 m2	Friesland, Groningen, Flevoland & Drenthe
	Wine & Liquer Store	26	33 m2	
Sanders Supermarkt B.V. HQ : Enschede Tel: 31-53-484 8500 Fax: 31-53-484 8501	**Sanders**	18	600 m2	Enschede and surrounding area
Vomar Voordeelmarkt B.V. HQ : IJmuiden Tel: 31-255-563 700 Fax: 31-255-521 649	**Vomar** (Voordeelmarket)	30	1,404 m2	North-Holland
	Wine & Liquer Store			
Co-op ‘82 U.A. HQ : Arnhem Tel: 31-26-384 3900 Fax: 31-26-384 3999	**Co-op**	49	685 m2	Gelderland, Overijssel, Utrecht & Zaanstreek

Van Eerd Food Groep B.V. HQ : Veghel Tel: 31-413-380 200 Fax: 31-413-343 634	**Jumbo** (incl. 16 franchisers)	47	600 m2	North-Brabant, Limburg, Gelderland & Zeeland
	Pryma (franchise)	19	232 m2	South-Holland, North-Brabant, Gelderland, Zeeland & Limburg
Sligro HQ : Veghel Tel: 31-413-343 500 Fax: 31-413-341 520	**Thuismarkt**	105	80 m2	Nation Wide
	SRV (incl. Springer & Partner/Milk etc.)			Nation Wide
	Eigen Formule/eigen naam		80-500 m2	Nation Wide
	Drop Inn	40	20-80 m2	Nation Wide
	Snoep Express (candy)	20	80-150 m2	Nation Wide
Laurus 24% approx. mkt. share				
Laurus N.V. HQ : Paralelweg 64 P.O. Box 175 5201 AD Den Bosch Tel: 31-73-622 3622 Fax: 31-73-622 3636	**Konmar**	29	4,000 m2	Nation Wide
	Super de Boer	402	500-2,500 m2	Nation Wide
	Edah	320	500-2,500 m2	Nation Wide
	Spar/convenience	220	200-500 m2	Nation Wide
	Basismarkt	176	450 m2	Nation Wide
	Antoine Petit Coffee	67	100 m2	Nation Wide
	Rijdende Winkels (mobile shops)	400		Nation Wide
Aldi 7% approx. mkt. share				
Aldi Netherlands B.V. HQ : Erasmusweg 3 4101 AK Culemborg Tel: 31-345-472 911 Fax: 31-345-419 383	**Aldi**	354	500 m2	Nation Wide

Albert Heijn 28% approx. mkt. share				
Albert Heijn B.V. HQ : Provinvialeweg 11 1506 MA Zaandam Tel: 31-75-659 9111 Fax: 31-75-631 3030 Mother Co. Koninlijke Ahold N.V.	**Albert Heijn**	495	1,127 m2	Nation Wide
	Franchises	169	874 m2	Nation Wide
	Primarkt	22	1,350 m2	South-Holland,
	Wine & Liquer Store	17	60 m2	North-Brabant & Limburg
	Den Toom (incl. Wine & Liquer Store)	1	2,300 m2	Rotterdam
	Albert Heijn Home Delivery	1		Heemstede
	Ter Huurne **GRENSWINKELS !!!**	2		Buurse & Venlo
	Etos (Drug store)	163	180 m2	Nation Wide
	Franchise	232	156 m2	Nation Wide
	Gall & Gall (Wine & Liquer	344	84 m2	Nation Wide
	Franchise	141		
	De Tuinen (Health food etc)	26	145 m2	Nation Wide
	Franchise	24		
	Jamin (candy)	71	97 m2	Nation Wide
	Franchise	61		

Purchase combination Wholesaler - Van Tol/ZHM				
Van Tol HQ : Europaweg 2 P.O. Box 64 2410 AB Bodegraven Tel: 31-172-619 311 Fax: 31-172-613 796	**Troefmarkt**	52	200 m2	Central Holland
	Emha mobile shops Springer & Partners mobile shops neighbourhood shops recreational shops	 239 8 98 40	< 100 m2	
	Vers Garant	5	80 m2	
Zuivel Handels-maatschappij (ZHM) HQ : Oosterwolde Tel: 31-516-568 600 Fax: 31-516-520 691	**SRV mobile shops**	234	10 m2	Nation Wide
	Springer & Partners	30	10 m2	Nation Wide
	PRO Markt	32	55 m2	Nation Wide
	Others	88	various	

Lidl				
Lidl Netherlands HQ :Huizermaatweg 45 1273 NA Huizen Tel: 31-35-524 2411 Fax: 31-35-526 4139	Lidl	43	650 m2	Nation Wide
Koopconsult 5% approx. mkt. share see Dirk van den Broek Bedrijven				
Cooperating Dirk van den Broek Bedrijven B.V. HQ : Flemmingweg 1 P.O. Box 631 2400 AP Alphen a/d Rijn Tel: 31-172-448 200 Fax: 31-172-474 636	**Dirk van den Broek**	28	1,000 m2	Amsterdam and surrounding area & East-Holland
	Bas ven der Heijden	27	900 m2	Rotterdam and surrounding area
	Digros	14	835 m2	Leiden and surrounding area
	Dirkson	8	1,000 m2	Area Utrecht
	Jan Bruijns	10	835 m2	Zeeland & North-Brabant
	Dino	3	500 m2	The Hague & Katwijk
T.S.N. 15% approx. mkt. share Trade Service Netherlands B.V. Plotterweg 4 P.O. Box 325 3800 AH Amersfoort Tel : 31-33-453 3600 Fax: : 31-33-455 0172				
SchuitemaN.V. HQ : Amerfoort Tel: 31-33-453 3600 Fax: 31-33-455 1087 Mother Co. Ahold holds 73%	**C1000**	354	711 m2	Nation Wide
	Kopak	57	291 m2	Nation Wide
	Casper	30	160 m2	Nation Wide
	Spar Voordeelmarkt	18	516 m2	Groningen, Friesland, Drenthe, Overijseel, Utrecht & South-Holland
Sperwer HQ : De Bilt Tel: 31-30-221 9211 Fax: 31-30-220 2074 Mother Co. B.V. Sperwer Holding	**Plusmarkt**	123	700 m2	Nation Wide
	Garantmarkt	103	285 m2	Nation Wide
	4=6 Service	20	95 m2	Nation Wide
	Gastrovino	43	120 m2	Nation Wide
	Others	42	150 m2	

Prisma Food Group HQ : Nijkerk Tel: 31-33-245 5455 Fax: 31-33-245 5401	**Golff**	69	681 m2	Nation Wide
	Boni	31	750 m2	Central, East, & North Holland
	Meermarkt	99	380 m2	Nation Wide
	Attnet	100	160 m2	Nation Wide
	Zomermarkt/Rekra	83	207 m2	Nation Wide
	SRV/Mobile Shops	187		Nation Wide
	Springer & Partners (Moble Shops)	10		Nation Wide
	Own Brand & Formula Shops	73		Nation Wide
Boon Sliedrecht HQ : Sliedrecht Tel: 31-184-418 500 Fax: 31-184-412 159	**MCD**	22	700 m2	Utrecht, South-Holland & North Brabant
	Meermarkt	9	300-600 m2	Nation Wide
	Wine & Liquer Store	4		
	Own Brand & Formula Shops	53	250-1,000 m2	Nation Wide
Codis C.V. HQ : The Hague Tel: 31-70-359 0390 Fax: 31-70-366 9098	**E-markt**	105	270 m2	Nation Wide
	Stipt	50	100 m2	Randstad/Central Holland
	Thuiswinkel (Mobile Shop)	20	29 m2	North-Holland
	Volumemarkt	40	550 m2	Nation Wide
	Others	185		

Source : Elsevier,
1 m2 = 10.764 Square Feet